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The passion to see it through.



Building Blocks of Effective Measurement: From Goal Setting to Assessing Impact

September 27, 2016

Agenda:

- Welcome and Introductions
- Key Building Blocks:
 - I. Gaining Goal Clarity
 - II. Deciding on a Measurement Focus
 - III. Enabling Strong Data Collection
 - IV. Aggregating Results
 - V. Integrating Findings into Strategy, Operations & Communications
- Case Study: ConAgra Foods Foundation
- Questions

I. Gaining Goal Clarity

Goal & Objective Setting



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Goal Clarity

Why is this important?

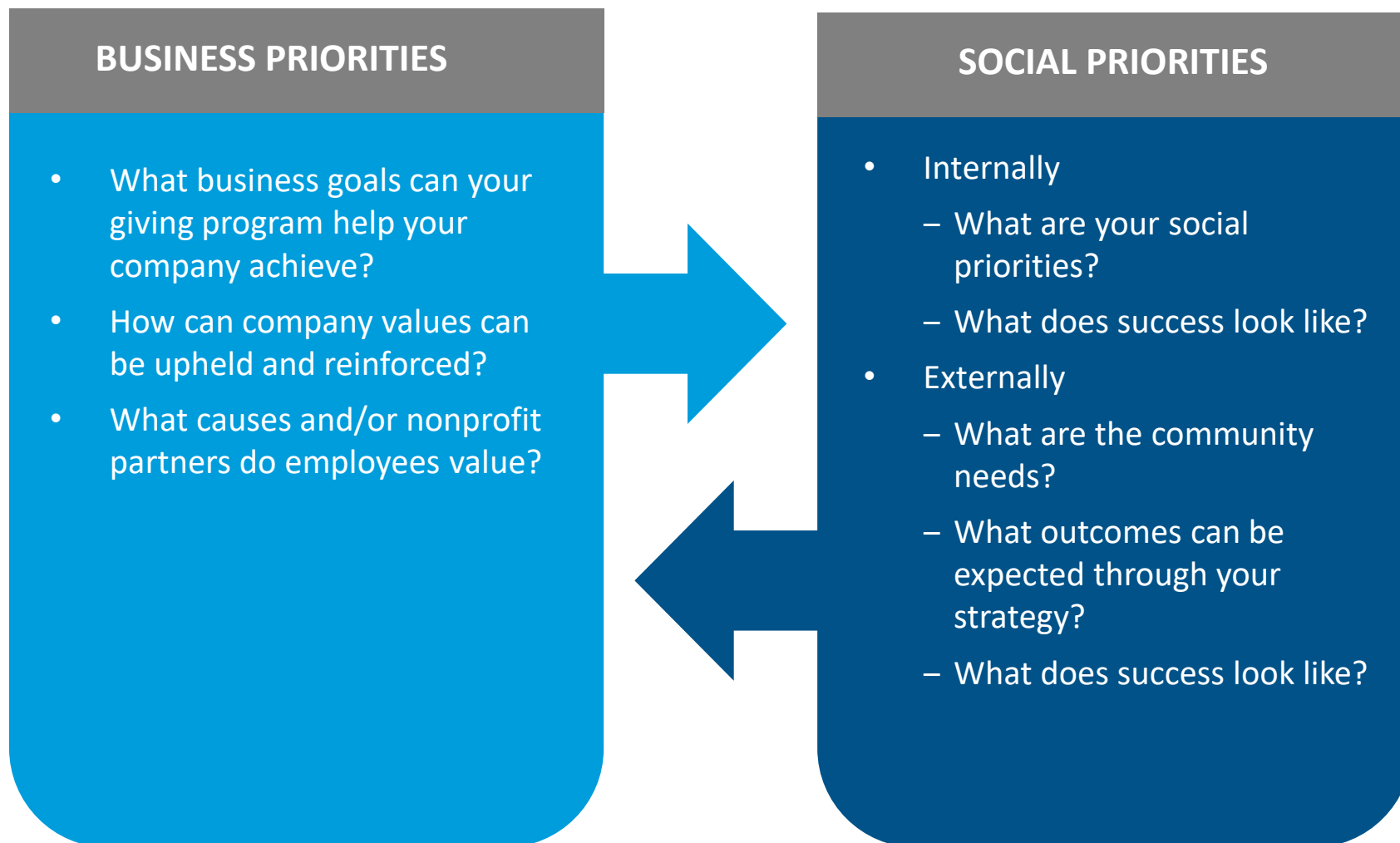
A lack of clarity on the objectives of the program mean ambiguity in your program measurement.

Unclear Goals  Unclear Measurements

Recommended Practices:

- Ensure goals reflect business AND social priorities
- Set SMART goals
- “Invest in change” approach

Ensure goals reflect business AND social priorities



Set SMART Goals



- Are you clear on what the **specific** outcome(s) should be?
- Is it something that you and your grantees have the capacity to **measure**?
- Is it something that can be **attained** by the program in the stated time period?
- Is it **relevant** to what needs to be achieved?
- Did you put a reasonable **timeframe** on the goal?

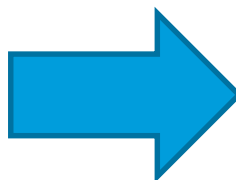
Acronym Source: Doran, G. T. (1981). There's a S.M.A.R.T. way to write management's goals and objectives. *Management Review*, Volume 70, Issue 11(AMA FORUM), pp. 35–36.; clarifying questions written by Changing Our World.

Shift to Investment Thinking

- From funder to investor
- From inputs and outputs to outcomes
- From simply doing good to **investing in change**

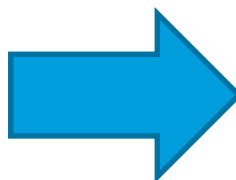
Goal:

Encourage our employees to volunteer 8 hours per year for a cause of their choice.



By 2018, engage 75% of our workforce in volunteer service activities that increase children's access to healthy, nutritious meals.

Deliver STEM education to 1 million youth across the country.



By 2018, deliver STEM education to 1 million 7th and 8th graders, 75% of whom will show increased knowledge in core STEM concepts.

II. Deciding on a Measurement Focus



Measurement Focus

Why is this important?

You don't have unlimited resources and you need to align your measurement efforts with what's most important to your company and its current goals.

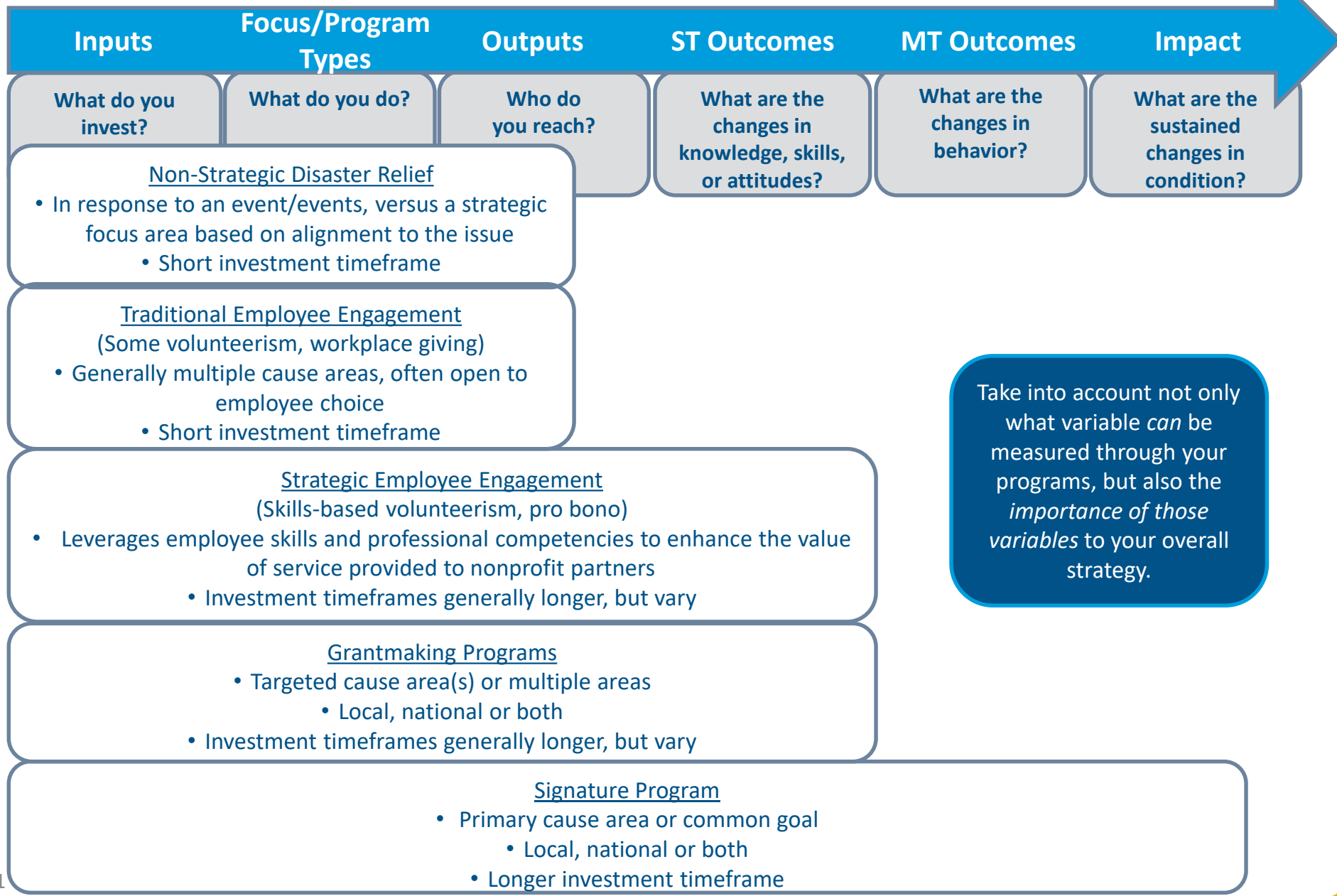
Recommended Practices:

- Understand your variables
- Understand what to expect from your programming
- Develop a logic model

Understand Your Variables

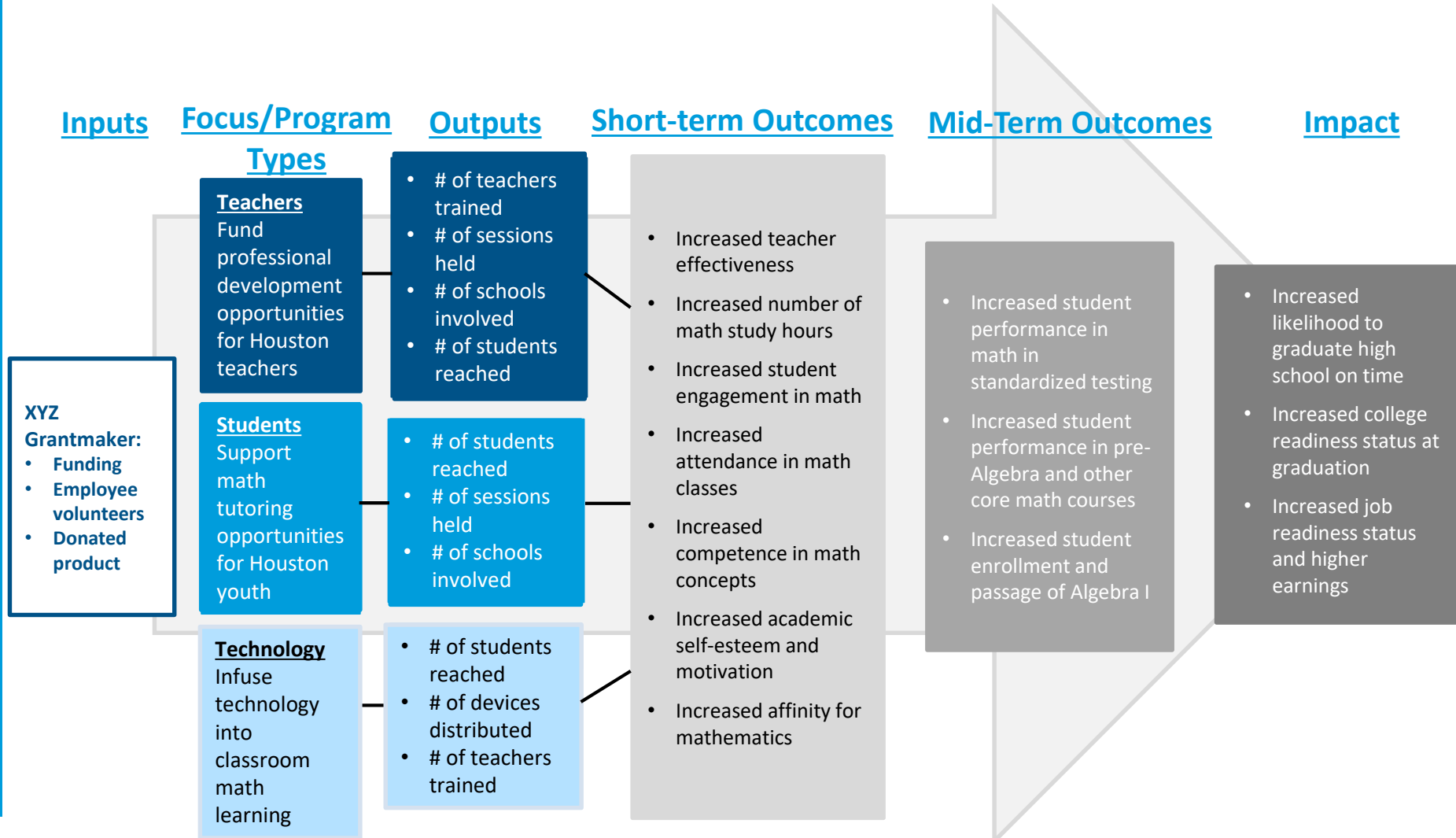
Inputs	Focus/Program Types	Outputs	Short-Term Outcomes	Mid-Term Outcomes	Impact
What resources do you invest?	What do your resources do/support?	Who do your activities reach; what do they directly produce?	What are the changes in <i>learning</i>?	What are the changes in <i>action</i>?	What are the sustained changes in <i>condition</i>?
<ul style="list-style-type: none"> • Money • Employee time • In-kind support 	<ul style="list-style-type: none"> • Direct service programming • Capacity Building • Advocacy • Research 	<ul style="list-style-type: none"> • # of people reached • # of nonprofits supported • # of services delivered, classes held, etc. • # of solutions identified 	<ul style="list-style-type: none"> • Increase in knowledge • Increased awareness • Increase in skills • Improvement of attitudes • Improved aspirations 	<ul style="list-style-type: none"> • Improved behavior and practices • Improved performance • Policies • Decision-making 	<ul style="list-style-type: none"> • Long term change for the future of the cause/ community

Understand What to Expect from Your Programming

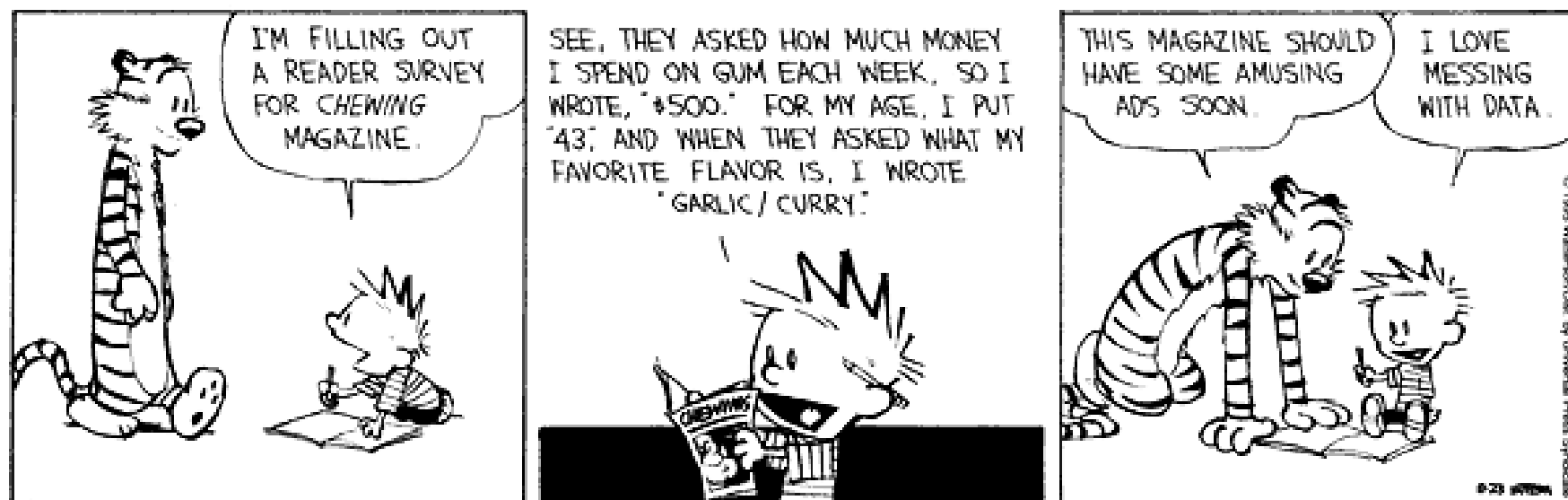


Develop a Logic Model

Mission: Increase Houston students' job readiness in STEM-related fields.



III. Enabling Strong Data Collection



Strong Data Collection

Why is this important?

To get the data that is most useful for you and to tell a valid and credible results story.

Recommended Practices:

- Select purposeful, clear, informed metrics
- Alignment between grant application and reporting templates
- Alignment across partners, programs and grant cycles
- Support partners in collecting data

Select Purposeful, Clear, and Informed Metrics

Metrics:

- ☐ Are based upon strategic, SMART goals
- ☐ Have a purpose/are not extraneous
- ☐ Have clear definitions
- ☐ Are informed by issue area experts
- ☐ Are a mix of quantitative and qualitative data

Alignment Between Grant Application and Reporting Tool

Grant Application	Final Report
Quantitative	
How many schools will you partner with to conduct tutoring sessions?	How many schools did you partner with to conduct tutoring sessions?
How many total children do you expect to reach through your tutoring program?	How many total children did you reach through your tutoring program?
How many tutoring sessions do you plan to conduct?	How many tutoring sessions did you to conduct?
Qualitative	
Upon program completion, what behavior changes do you expect program participants to achieve?	What behavior changes did program participants demonstrate? Please be specific in articulating how many participants achieved each type of behavior change and how you assessed that that change was made.
Upon program completion, what attitude changes do you expect program participants to achieve?	What attitude changes did program participants demonstrate? Please be specific in articulating how many achieved each type of attitude change and how you assessed that that change was made.
Upon program completion, what new skills do you expect program participants to attain?	What new skills did program participants attain? Please be specific in articulating how many participants achieved each type of knowledge or skill and how you assessed that that change occurred.

Alignment Across Partners, Programs and Grant Cycles

Partners and Programs

- ☐ Ask for the same metrics
- ☐ Define metrics consistently, even small details
 - Standard background information (e.g. demographics, contact information)
 - “Total budget” - operating budget or total project budget?
 - # of sessions held: How do you define a session?

Grant Cycles

- ☐ Try to keep grantees on the same grant cycle

Support Partners in Collecting Data

Working with Grantees:

- ☐ Help grantees understand your goals
- ☐ Use grantee check-ins/communications
- ☐ Customize options for grantees
- ☐ Ease data collection burden where possible
- ☐ Provide feedback/serve as a facilitator of learnings and best practices

IV. Aggregating Results



Results Aggregation

Why is this important?

Enables you to speak to the work conducted and the results achieved across your foundation and/or company.

Recommended Practices:

- Use dashboards to track individual grant and aggregate portfolio results
- Extract lessons learned and look for common themes across programs

Use Dashboards to Track Grant and Portfolio Results

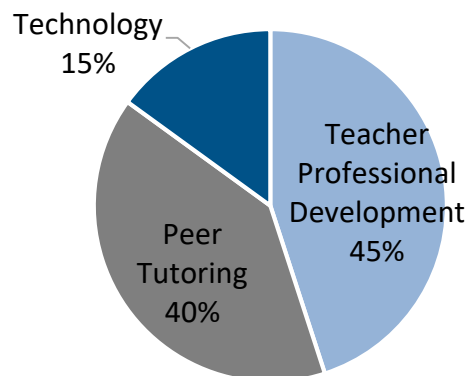
Per grantee:

XYZ Nonprofit 2016-2017: Math Education Grant	Target	Actual	% of Projection Reached	Goal Met?
Number of teachers trained	150	171	114%	✓
Number of training sessions held	50	62	125%	✓
Number of schools involved	100	75	75%	✗
Number of employee volunteer hours	100	50	50%	✗
Number of students reached	7,500	8,775	117%	✓
Number of devices distributed	450	526	117%	✓

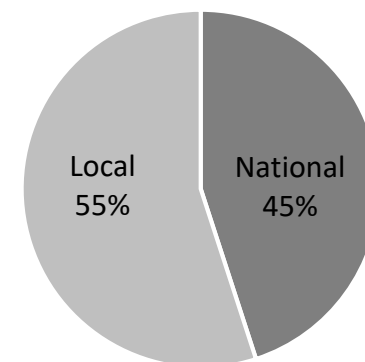
Aggregate portfolio:

XYZ Grantmaker 2016-2017: Math Education Grants	Target	Actual	% of Projection Reached	Goal Met?
Number of teachers trained	1,000	1,700	117%	✓
Number of students reached	50,000	63,000	126%	✓

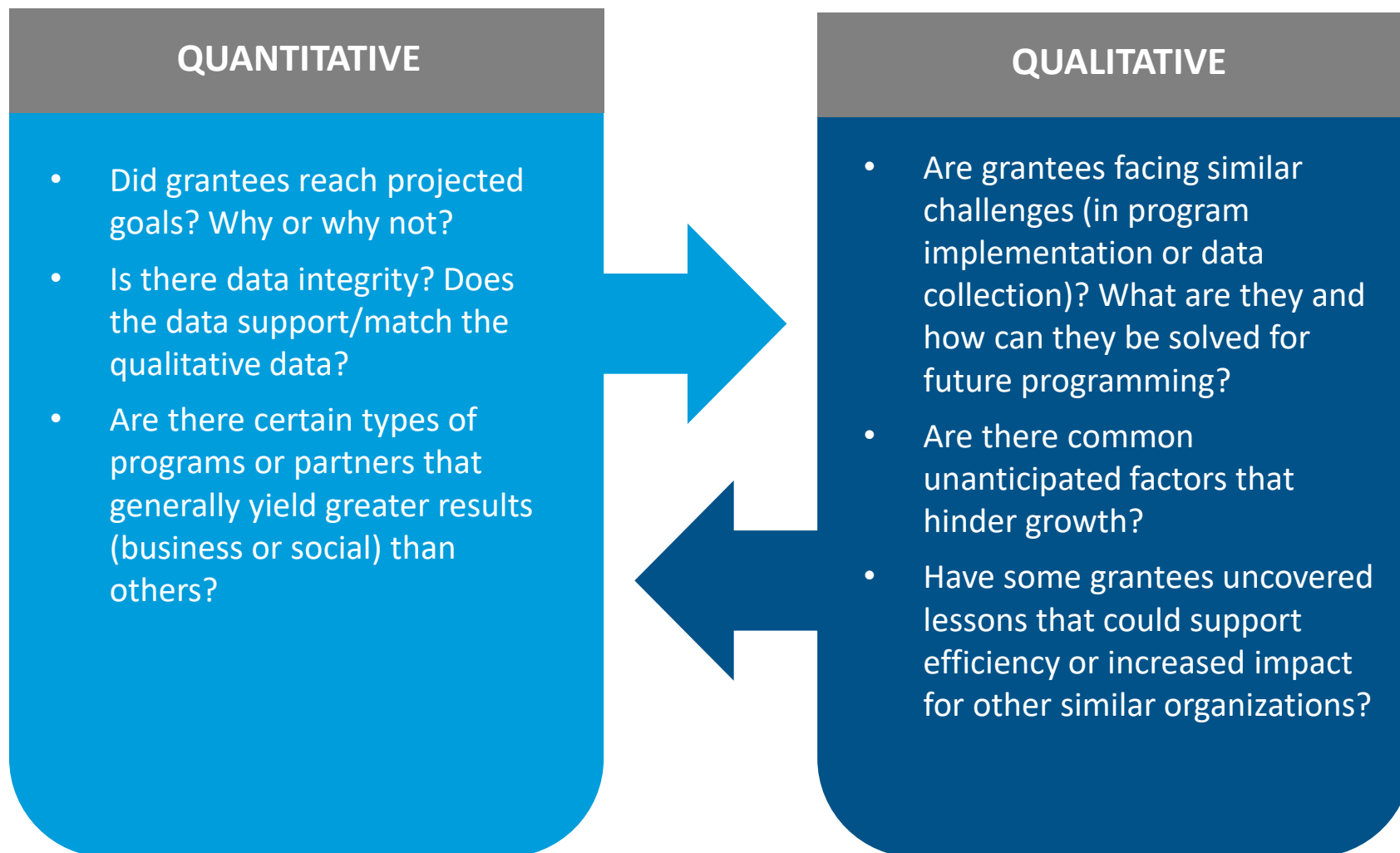
Distribution of Funds



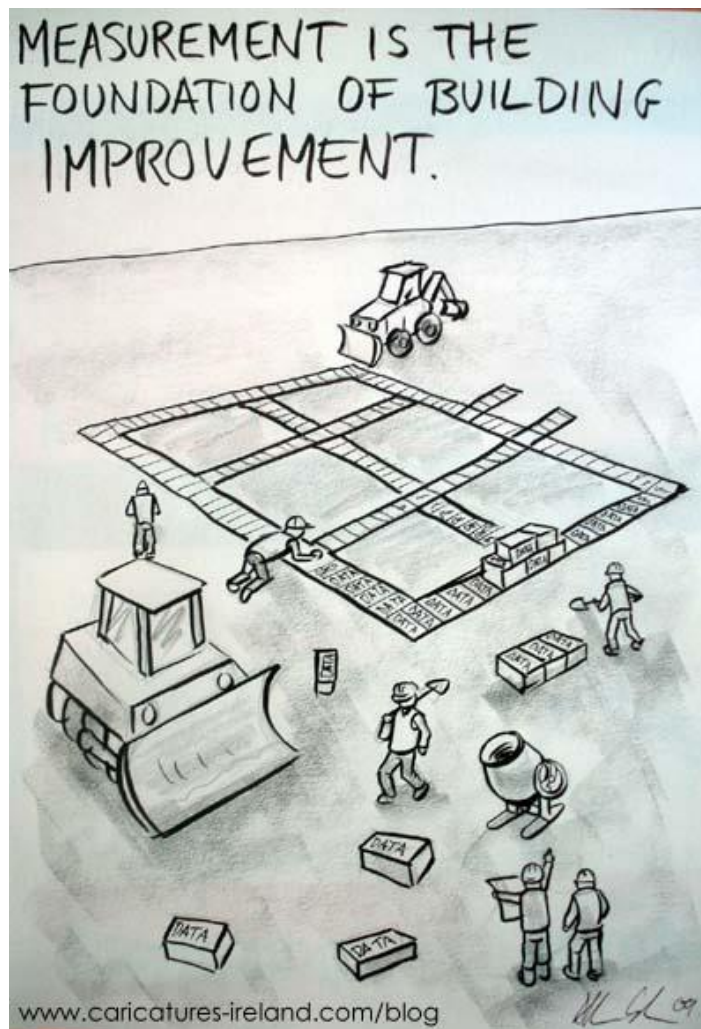
National vs. Local Investment



Extract Lessons and Common Themes



V. Integrating Findings into Strategy, Operations & Communications



Results Integration

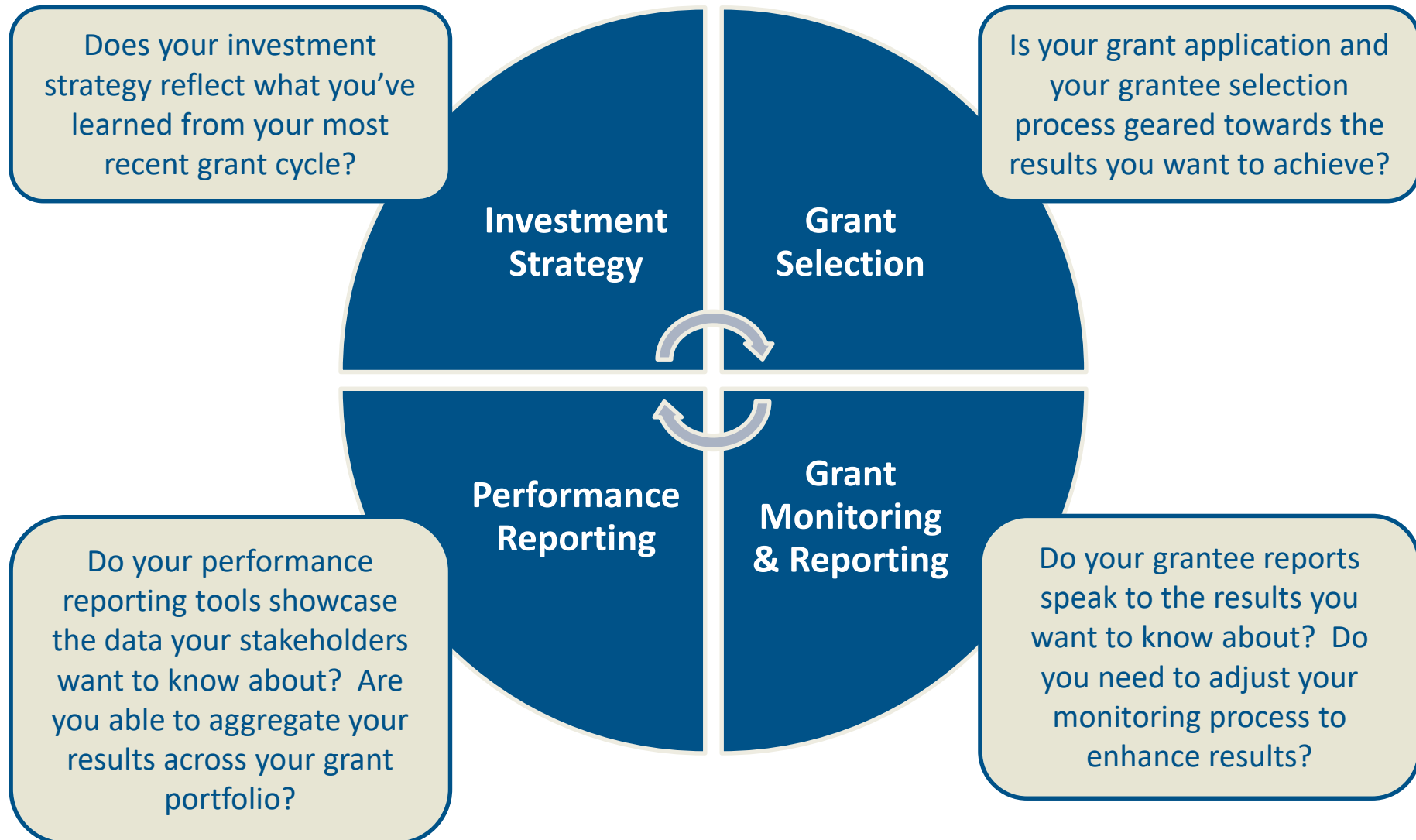
Why is this important?

- To ensure your investment strategy is data-driven
- To tell your results story
- To engage your employees
- To continue to learn and grow
- To develop thought leadership

Recommended Practices:

- Incorporate results into each stage of your grantmaking cycle
- Ensure communications implementation reflects holistic impact and is tailored to stakeholder (internal and external) needs

Incorporate Results into Each Stage of the Cycle



Effectively Communicate Holistic Impact

Key Output Results Statements for XYZ Company's FY17 Funding Cycle

- XYZ Company provided **418 training sessions to 1,140 teachers nationwide** through its 2016-2017 grantmaking.
- XYZ Company improved the quality of math education for **50,000 students in 667 schools** through teacher professional development.
- Through XYZ Company's support, math tutoring programs in Houston **served twice as many students as last year.**
- **Three hundred employees were engaged in more than 1,000 hours of skills-based service; 85% of employee volunteers** responded that the opportunity to volunteer in these programs, "**makes me proud to work for XYZ Company.**"
- XYZ Company was recognized in at least **130 forms of media and garnered over 80 million media impressions.**

External

Internal

Qualitative Storytelling

"The most important thing I've learned from this project was that math is actually fun!"

"My younger brother and sister don't get good grades in Math. I hope I can teach them what I have learned!"

"I am much more confident in the classroom thanks to the practical applications I learned during professional development!"



Strong Measurement System: Your Checklist

Goal Clarity

- ☐ Goals reflect business and social priorities.
- ☐ Goals are SMART.
- ☐ Goals reflect an investment in change, rather than simple focus on good deeds.

Measurement Focus

- ☐ Understand your output and outcome variables.
- ☐ Understand what data to expect from your programming.
- ☐ Develop a logic model.

Strong Data Collection

- ☐ Grant application, reports and cycles are aligned.
- ☐ Purposeful, clear and informed metrics are selected.
- ☐ Partners are supported in data collection.

Results Aggregation

- ☐ Dashboards are used to collect core metrics for individual grants and across the portfolio as a whole.
- ☐ Lessons learned and common themes across programs are extracted.

Results Integration

- ☐ Results are incorporated into each stage of your grantmaking cycle.
- ☐ Communications reflects holistic impact and is tailored to stakeholder (internal and external) needs.

Case Study: ConAgra Foods Foundation 2015 Strategy

Signature Cause Framework

ConAgra Foods Foundation: Tackling Child Hunger in the U.S.

Mission

To improve the quality of life of millions of families by taking action to solve child hunger.

Approach

Local and national grantmaking, and employee engagement that support the following:



Access to Food

- ✓ By 2018 enable 2.5 million additional children to access nutritious meals through enrollment and participation in the Federal Nutrition Programs.
- ✓ By 2018 close the gap in meals needed by 25% among households with children struggling with hunger in the company's largest operating communities.



Food Knowledge & Skills

- ✓ By 2018, help 250,000 youth and their families have more balanced, nutritious diets and maximize their food resources.
- ✓ Create improved nutrition environments and settings among 2,500 community-based service providers where children learn and play.



Pursuing Solutions

- ✓ By 2018, enhance and strengthen the capacity of 25 partners across the country to strategically address child hunger and nutrition.
- ✓ By 2018, strengthen the capacity and reach of nonprofits through the donation of at least 500,000 hours of service in the fight against child hunger, including 25% of hours dedicated to pro-bono and skills-based service.
- ✓ By 2018, train and develop at least 2,500 youth and young adults as future leaders in the fight against child hunger.

Sample Grantee Report – Quantitative Outputs

Outputs Section:

Number of children served (0-18)	870	Number of children receiving nutrition education materials or collateral	680	Number of nutritious snacks served	0
Number of meals served	0	Number of adults receiving nutrition education materials or collateral	680	Number of children served nutritious snacks	0
Number of children served meals	0	Number of community volunteers engaged	0	Number of nutrition education content hours delivered to children	186
Number of children educated in nutrition education courses	870	Average number of hours worked per volunteer	0	Number of nutrition education content hours delivered to adults	60
Number of adults educated in nutrition education courses	291	Total attendance at conferences, workshops or convenings	300		

Sample Grantee Report – Qualitative Outputs

Data Point	Description
Outcomes	What are the outcomes of your program? Please report in terms of change in knowledge, skills, attitudes, or behavior.
Program Successes and Highlights	What are some key successes or highlights from programming? Please share milestones that you are particularly proud of, systematic efficiencies uncovered, or any other achievements of note. Quotes, stories or anecdotes are welcome.
Unanticipated Factors	Please explain any barriers that impeded your ability to progress towards achieving the primary goals of the project. Additionally, if there are any unanticipated positive circumstances that contributed to the project's success, please explain those as well.
Application of Learnings	How will you use learnings from this project to inform your future work or to improve work across the field?

Dashboard: Outputs to Performance Targets

Core Portfolio Outputs	Target	Actual at Close of Grant	% of Target Achieved	Met Goal?
Number of children served (0-18)	247,337	999,958	404%	✓
Number of meals served	36,310,884	146,237,801	403%	✓
Number of children served meals	237,147	991,230	418%	✓
Number of children educated in nutrition education courses	12,500	13,221	106%	✓
Number of adults educated in nutrition education courses	30,000	2,687	9%	X
Number of children receiving nutrition education materials or collateral	12,500	13,221	106%	✓
Number of adults receiving nutrition education materials or collateral	20,000	7,182	36%	X
# Grantee media items featuring ConAgra	42	49	117%	✓
Total number of volunteer hours logged	285,250	1,675,864	588%	✓

Aggregate Portfolio Outputs – Year to Year Comparison

Total Investment Outputs	FY11 (June 2010- May 2011)	FY12 (June 2011 – May 2012)	FY13 (June 2012 – May 2013)	FY14 (June 2013 – May 2014)	FY15 (June 2014-May 2015)
ConAgra Foods Foundation Grants	\$5,858,522	\$4,478,745	\$4,654,636	\$5,431,884	\$5,024,808
Total children served (0-18 yrs. old)	79,208 children	296,347 children	1,565,510 children	710,646 children	3,769,679 children
Meals served	4,476,968 meals	2,098,735 meals	32,965,866 meals	99,125,712 meals	225,666,185 meals
Children served meals	64,215 children	309,701 children	648,869 children	216,562 children	3,760,951 children
Volunteer hours logged Valued at**:	101,279 hours \$2,111,668	117,739 hours \$2,454,860	164,991 hours \$3,440,062	32,590 hours \$734,904	1,676,884 hours \$73,716,019
Children receiving nutrition education	15,697 children	20,538 children	95,772 children	42,493 children	45,468 children
Adults receiving nutrition education	14,308 adults	17,121 adults	27,155 adults	10,202 adults	2,687 adults
Children receiving nutrition education collateral	20,336 children	91,903 children	299,052 children	44,976 children	13,271 children
Adults receiving nutrition education collateral	109,476 adults	59,295 adults	148,721 adults	51,868 adults	7,182 adults
Grantee marketing channels featuring ConAgra Foods	141 channels	350 channels	113 channels	105 channels	62 channels

Framework for Measuring Against Goals

	FY13	FY14	FY15	Total To Date	2018 Goal	% Achieved
ACCESS TO FOOD GOALS						
By 2018 enable 2.5 million additional children to access nutritious meals through enrollment and participation in the Federal Nutrition Programs.	209,421	561,114	2,911,850	3,682,385	2,500,000	147%
By 2018 close the gap in meals needed by 25% among households with children struggling with hunger in the company's largest operating communities.	0	0	0	0	N/A	0%
FOOD KNOWLEDGE & SKILLS GOALS						
By 2018, help 250,000 youth and their families have more balanced, nutritious diets and maximize their food resources.*	66,206	31,966	32,226	130,398	250,000	52%
Create improved nutrition environments and settings among 2,500 community-based service providers where children learn and play.	0	0	0	0	2,500	0%
SUSTAINABLE SOLUTIONS FOR A HUNGER-FREE TOMORROW GOALS						
By 2018, enhance and strengthen the capacity of 25 partners across the country to strategically address child hunger and nutrition.	14	7	13	34	25	136%
By 2018, strengthen the capacity and reach of nonprofits through the donation of at least 500,000 hours of service in the fight against child hunger, including 25% of hours dedicated to pro-bono and skills-based service.	164,991	52,803	1,675,864	1,893,658	500,000	379%
By 2018, train and develop at least 2,500 youth and young adults as future leaders in the fight against child hunger.	54	509	59	622	2,500	25%

Communications Integration - Reporting



ConAgra Foods Foundation

Working to improve the quality of life of U.S. families by taking action to solve child hunger.

Since 2011, the Foundation has:

- Invested \$29,448,595 to support local and national anti-hunger organizations
- Served 366,465,687 meals to over 5 million children at risk of hunger across the country
- Facilitated nutrition education for 219,968 children and 71,549 adults
- Logged 2,093,483 volunteer hours valued at \$82,457,513 in the fight against child hunger
- Disseminated key nutritional messages to 469,538 children and 376,542 adults

MEMBER OF
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COMPANY GIVING
CONAGRA FOODS FOUNDATION
TAKE ACTION

FEEDING KIDS
EMPOWERING FAMILIES
PURSUING SOLUTIONS
LEARN ABOUT GRANTS

Critical Meals for Kids During Summer

When school is out, more than 80 percent of the 22 million children who rely on free or reduced-price school meals are left wondering about their next meal.³

Through Feeding America's national *Hunger-Free Summer* program, we are able to provide meals to food insecure children and families via the food bank system to ensure children have the food they need to learn and grow during the critical summer months.

From 2010-2013, the number of children reached through these summer feeding programs increased by 166% to 33,000 children. In 2014, that number increased again by almost 39% to reach 46,166 children.

The *Hunger Free Summer* program also supports organizations in the Feeding America network to pilot and scale new, innovative ways to provide more meals to food insecure kids during the summer months.




Photo credit: Feeding America

Questions?



Thank you!

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